

# TV Performance Report H2 2019

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T>>>VISION



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# — Redefining Premium Video This Upfront Season

There have never been more options for consumers or opportunities for marketers in the video space. With the streaming wars kicking into high gear, the battle for consumer attention has never been more fierce. As we head into the Upfront season, the conversations around premium video continue to pervade client board rooms and agency war rooms across the industry. Is premium video worth the incremental cost? Does premium video provide a positive halo to brands? How does premium video vary for different consumer segments?

All of these are valid questions, but perhaps we need to step back for a moment. What is premium video, anyway? Some define it by production value, others by passion, viewing intensity, engagement, appointment viewing, or must-see TV. I believe the one universal constant underpinning premium video is attention. Getting it, retaining it, validating it, and getting it again next time. For decades, we have used a legacy measurement tool to create a surrogate for attention. It was called a rating, and it delivered us insights into programming and quantified viewership. We now know that ratings are not necessarily correlated with consumer attention, and today we have far more valuable tools in our arsenal.

TVision introduced the concept of television viewability and ad attention a few short years ago. The premise was relatively simple: in order for marketers to get the greatest value from their investments, programming needed to be watched, and ads needed to be paid attention to. Needless to say, there is great variability in viewability (person in the room) and ad attention (eyes on screen) from network to network and show to show. This data should be a critical input for marketers and agency teams to ensure that they are buying premium video that delivers attentive and receptive audiences.

In this report, you will find fresh, new data that looks at viewability and attention across dayparts and demographics. We explore the winners and losers in sports, entertainment, award shows, and brand marketer performance by vertical category. In addition, as we near the height of the presidential primary season, we also take a look at the political arena and the differences between primetime political programs. Not surprisingly, we find that the category as a whole over-indexes on both viewability and attention.

Perhaps the most exciting data in this report shows new measurement across the OTT landscape. Universal OTT measurement across all platforms and apps has been elusive to the marketplace. TVision is now able to provide a view into this rapidly growing area by providing co-viewing rates and Attention Index. Attention Index compares the attention viewers pay during a given show against a baseline index, which can help identify the most valuable programming in the OTT space. It enables us to redefine premium video in a similar way across the video ecosystem, and that is invaluable data for Upfront planning.

Let's be sure we take advantage of all the available data in the market as we head into the upfronts this season. Premium video is only premium if it is viewed and wins consumer attention.

Happy negotiating!

- DAVID COHEN

David Cohen led MAGNA's North America business from 2016 to 2019 - driving investment, intelligence and innovation in his role as President. David also led Global Partnerships for MAGNA and has helped set the overall vision and remit for the organization.

David is innately driven to push boundaries and challenge the status quo, having served as the Chair of the 4A's (American Association of Advertising Agencies) Digital Marketing Committee from 2009-2012, as well as on advisory boards for the IAB, Google, Facebook, and Snapchat. He currently provides his industry expertise as an advisor to TVision.



## TV Performance Metrics



### Viewability (%):

This metric measures how effectively viewers are kept in the room while ads are on-screen. It is measured as the percentage of all ad impressions in which a viewer was in the room for two or more seconds.



### Attention (%):

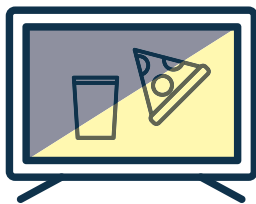
This metric measures how effectively an ad or ads held viewers' attention while they aired. It is measured as the percentage of all ad impressions in which the viewer was looking at the TV screen for two or more seconds.



### Creative Attention Score (CAS):

This metric measures an ad's ability to grab the audience's attention, as compared to surrounding ad content. CAS measures the percentage of an ad's aggregate run time that viewers spent with their eyes on the screen, as indexed against the other ads that ran in the same ad pod.

## Understanding the Differences Between TV & Digital Viewability



**TV Viewability:**  
Is the *PERSON* in front of the screen?



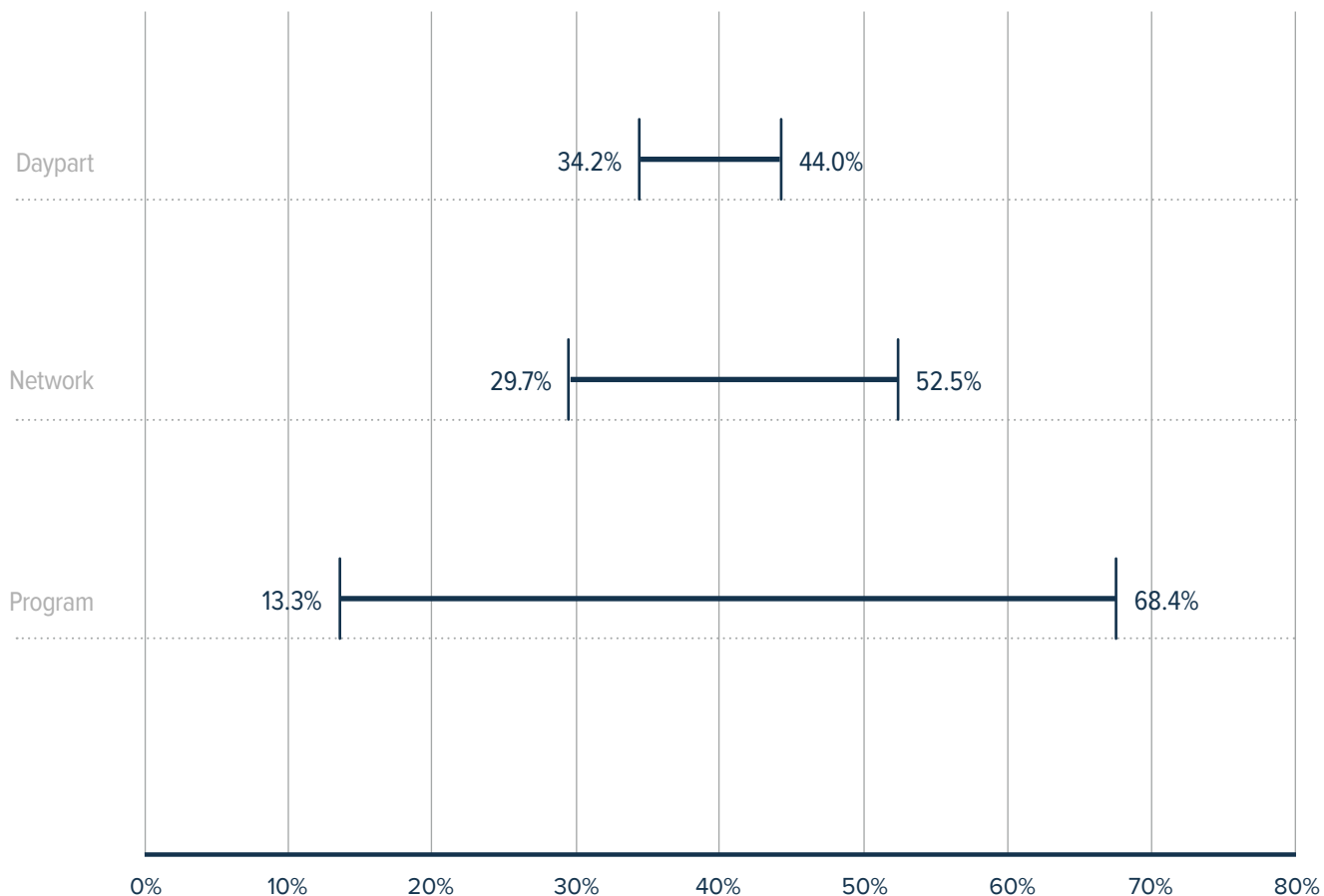
**Digital Viewability:**  
Is the *AD* on the screen?

# The Variance of TV Attention

We recently analyzed how TV viewer Attention varies depending on when and where an ad runs. What we found is that this crucial metric fluctuates a great deal across different networks and programs.

Using our cutting-edge computer vision technology, we learned that some networks have Attention percentages as high as 52.5%, while others saw just 29.7% of their ads receive an average of two or more seconds of eyes-on-screen Attention. This metric varied even more drastically between programs, with the top program delivering 68.4% Attention and the lowest-performing program coming in at just 13.3%.

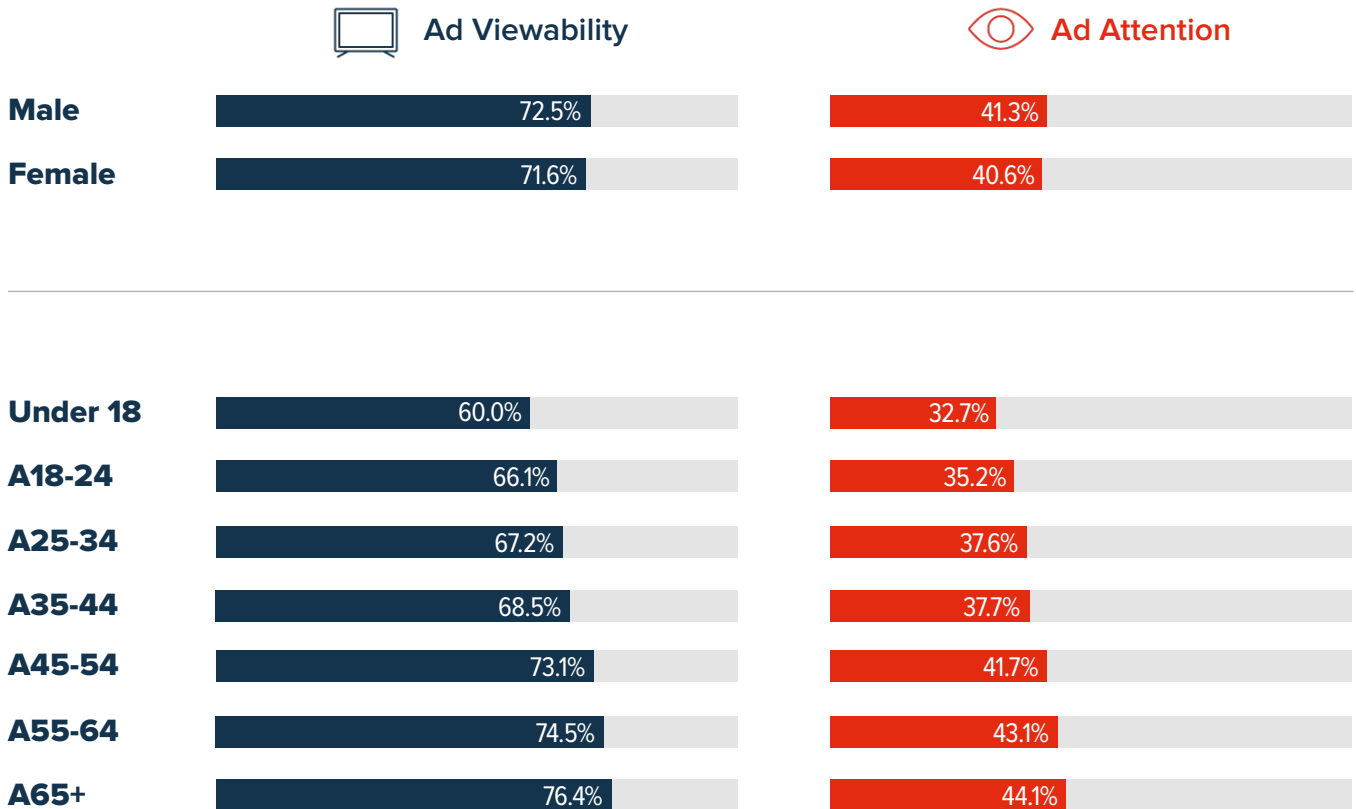
## TV Attention Varies by Many Media Factors



# TV Ad Performance by Gender & Age

TV performance also varies based on the demographic characteristics of the audience. While ad Viewability and Attention are fairly even across male and female viewers, the metrics fluctuate significantly between viewers of different age groups.

In the second half of 2019, Attention increased among viewers of each successive age group, with 65-and-older TV watchers paying Attention to 44.1% of ads and those 18-and-under clocking in at 32.7%. The trend of older viewers being more engaged with TV ads than their younger counterparts also held true across our Viewability data.



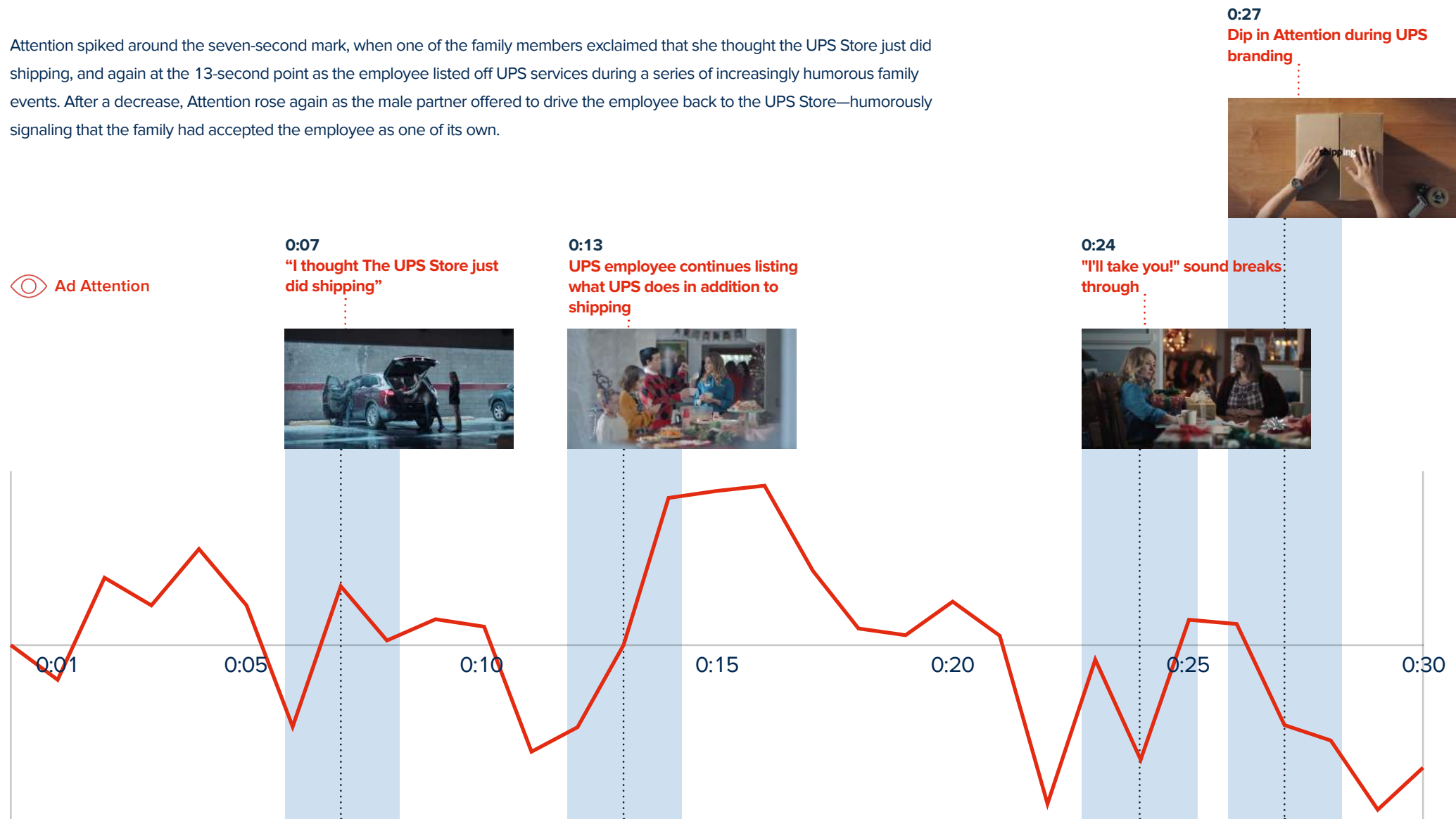
# How The UPS Store Scored H2's Most Engaging Ad

TVision's person-level, second-by-second Attention measurement allows advertisers to understand how viewers are engaging with any TV ad, and which creative elements are driving that engagement.

Recently, we analyzed a UPS Store holiday ad that was one of the top commercials of 2019. Originally released in 2018, the comedic spot features an overly enthusiastic UPS Store employee who follows a family home while listing off the many packing and shipping services UPS offers.

Attention spiked around the seven-second mark, when one of the family members exclaimed that she thought the UPS Store just did shipping, and again at the 13-second point as the employee listed off UPS services during a series of increasingly humorous family events. After a decrease, Attention rose again as the male partner offered to drive the employee back to the UPS Store—humorously signaling that the family had accepted the employee as one of its own.

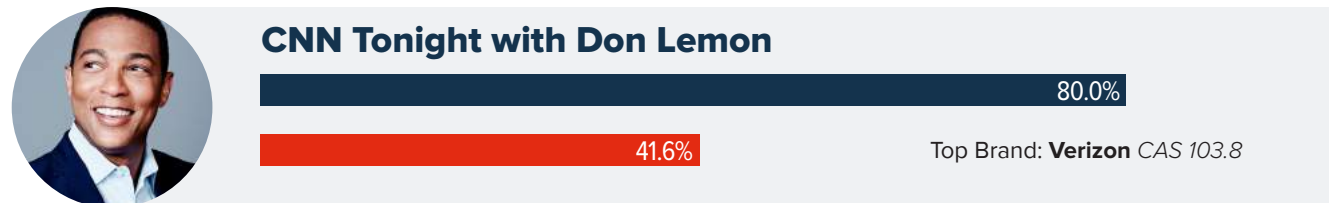
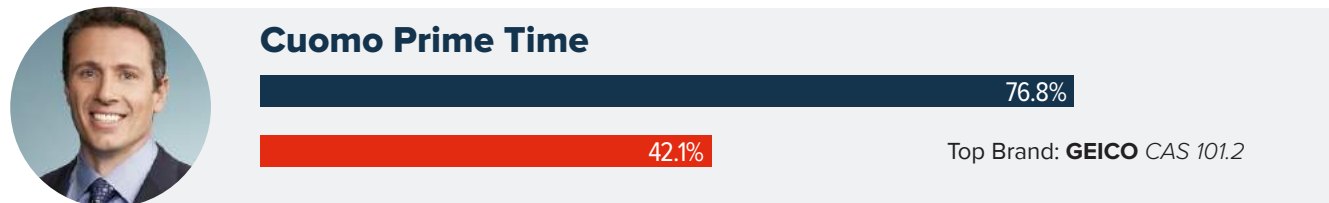
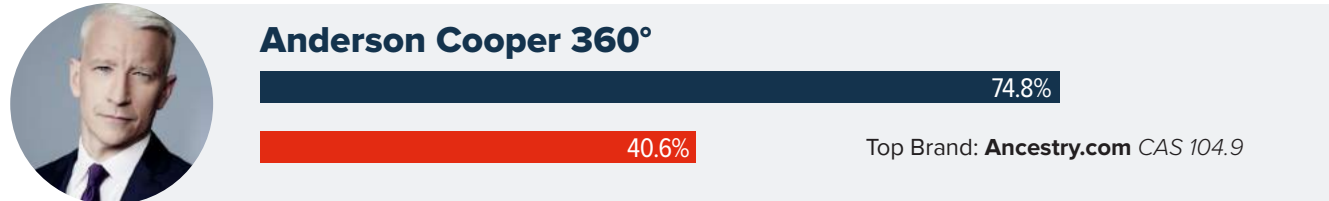
 Ad Attention



# Primetime Politics: A High-Engagement Advertising Opportunity

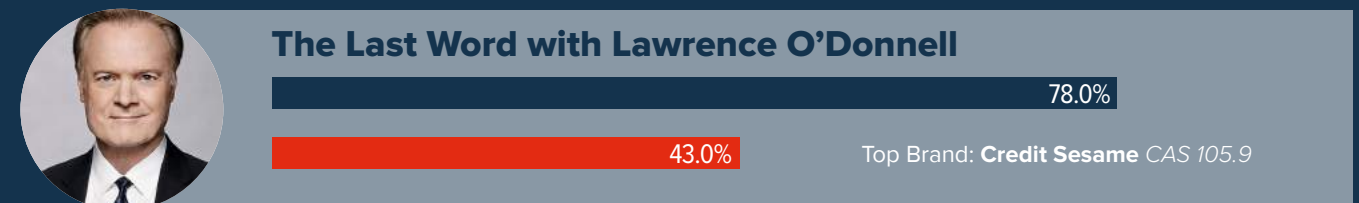
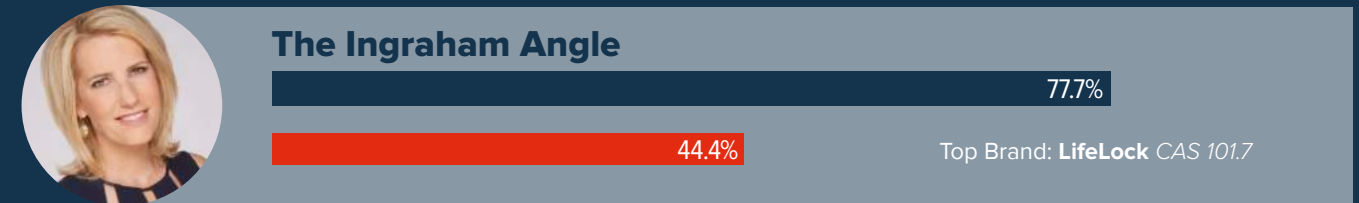
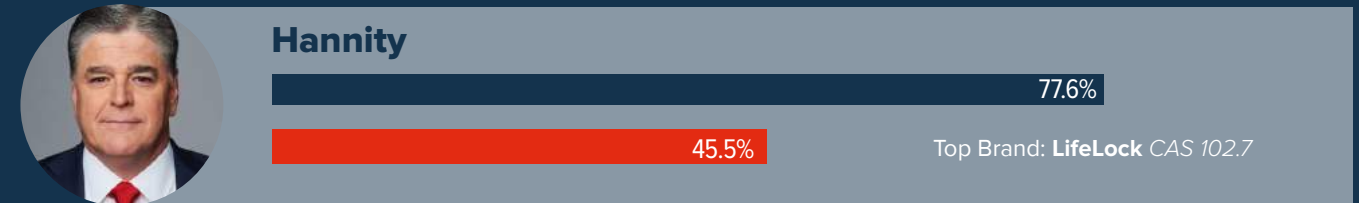
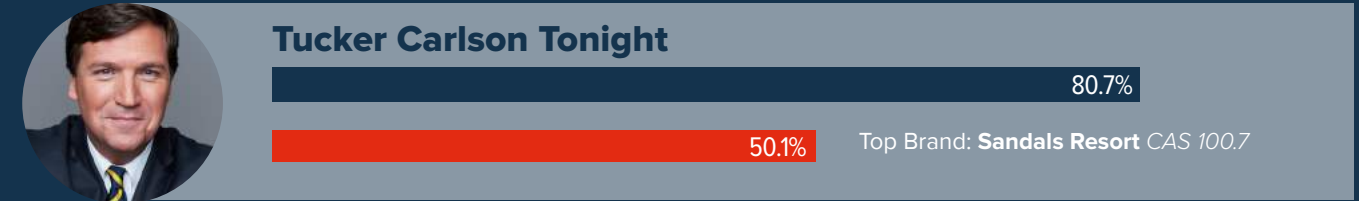
With the Democratic presidential primaries in full swing, we analyzed the way viewers engage with primetime political shows on CNN, Fox News, and MSNBC. Through this analysis, we learned that these shows over-index for both Attention and Viewability, a fact that may be attributable to their older-than-average audiences. While the content of these programs can be highly controversial, their high Viewability and Attention scores make them an efficient buy for advertisers.

 Ad Viewability  Ad Attention



FOX News' *Tucker Carlson Tonight* led the pack in both Viewability and Attention, with viewers keeping their eyes on the screen during more than half of the ads that ran during it. In fact, FOX News programs came first, second, and third in the Attention category, suggesting a locked-in audience for its news coverage. Though *CNN Tonight with Don Lemon* came in second in Viewability at 80%, it posted one of the lowest Attention rates of the bunch.

The most Attention-grabbing advertisers during these programs include Ancestry.com and Credit Sesame.





# The MLB All-Star Game Shines Bright in 2019

Live events are the lifeblood of broadcast and cable television, and H2 2019 had its fair share of major sports and entertainment events.

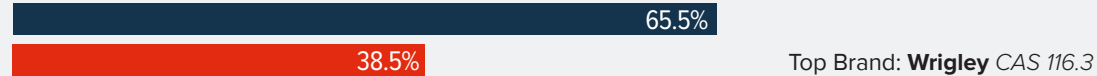
For Major League Baseball, the second half of 2019 played host to its marquee events, including the World Series, Home Run Derby, and All-Star Game. In a bit of a surprise, July's All-Star Game outperformed the World Series in both Viewability and Attention.

Advertisers who broke through for MLB events included Spectrum Wireless, Wrigley, and Dulcolax.

 Ad Viewability
  Ad Attention



## 2019 Home Run Derby



## 2019 MLB All-Star Game



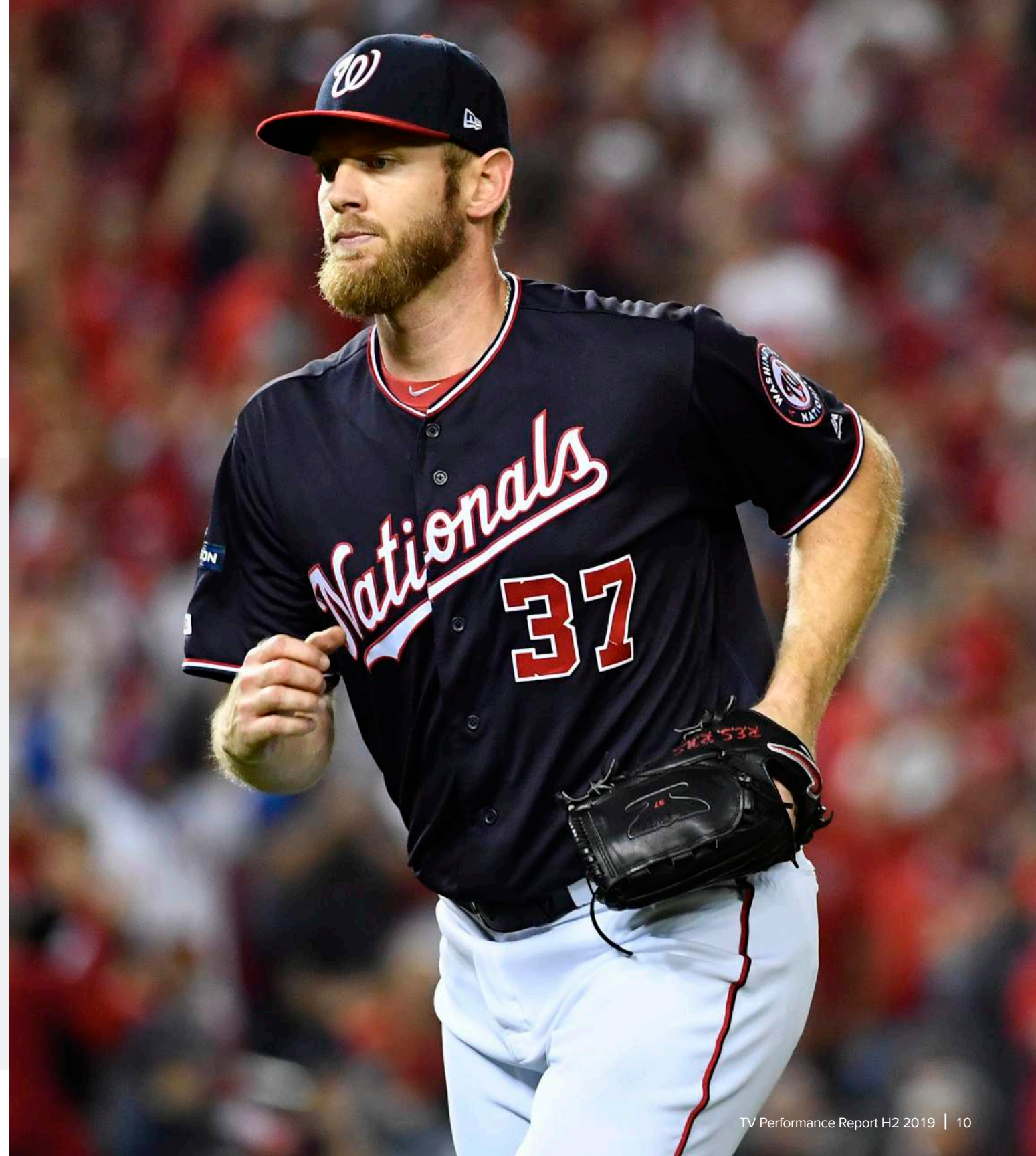
## Major League Baseball Division Series



## Major League Baseball League Championship Series



## World Series



## Major Sporting Events: Wimbledon Takes the Match

Whether your favorite sport is football, tennis, or baseball, the second half of 2019 featured major events to keep fans engaged. The 2019 Wimbledon Finals came in first for both Viewability (70.3%) and Attention (44.2%) among the major sporting events from H2 2019.

The most effective advertiser of the season was Old Navy, which posted a Creative Attention Score of 119.2 during college football's Fiesta Bowl. Other big winners include McDonald's, Smirnoff, and Apple iPhone.

 Ad Viewability  Ad Attention



### Wimbledon Finals



### U.S. Open Finals



### Peach Bowl - LSU vs Oklahoma



### Fiesta Bowl - Clemson vs Ohio State



## Major Entertainment Events: Awards Shows Deliver in H2 2019

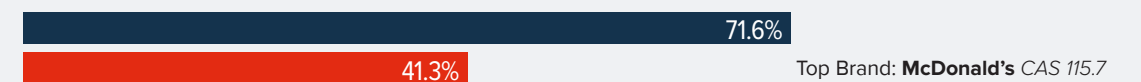
Awards shows in the second half of the year were a big hit, with all of them posting fairly strong Viewability and Attention scores. The Emmy Awards led the way in both categories, with a highly engaged audience tuning in for what wound up being a big night for the Amazon Prime comedy *Fleabag* and HBO's world-beating drama *Game of Thrones*.

The lone underperformer of H2 2019's major entertainment events was the Macy's Thanksgiving Day Parade, which many viewers likely kept on in the background as they prepared for their holiday feasts.

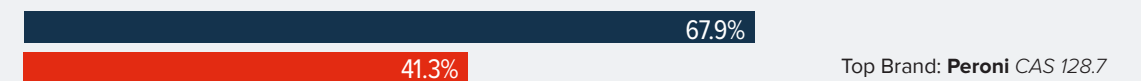
Top-performing advertisers included Peroni, Capital One, and McDonald's.



### 2019 American Music Awards



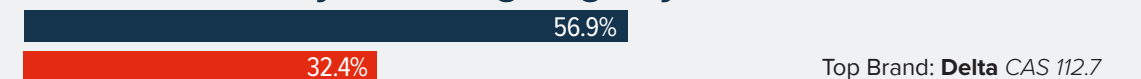
### 2019 Miss Universe



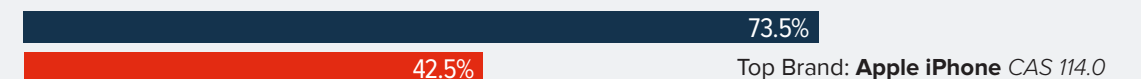
### 2019 Emmy Awards



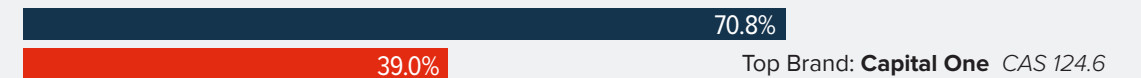
### 93rd Annual Macy's Thanksgiving Day Parade



### 2019 CMA Awards



### 2019 ESPYS



# Top Primetime Broadcast & Cable Programs

## BROADCAST

CBS and NBC were home to the most engaging primetime broadcast shows of H2 2019, taking all but one of the top seven slots in both the Viewability and Attention categories.

NBC's *Perfect Harmony* and *Sunnyside* both finished inside the top ten for Viewability and Attention, as did CBS' *The Code*, *Young Sheldon*, and *Bob Hearts Abishola*. The only other show to accomplish this feat was The CW's *Nancy Drew*.

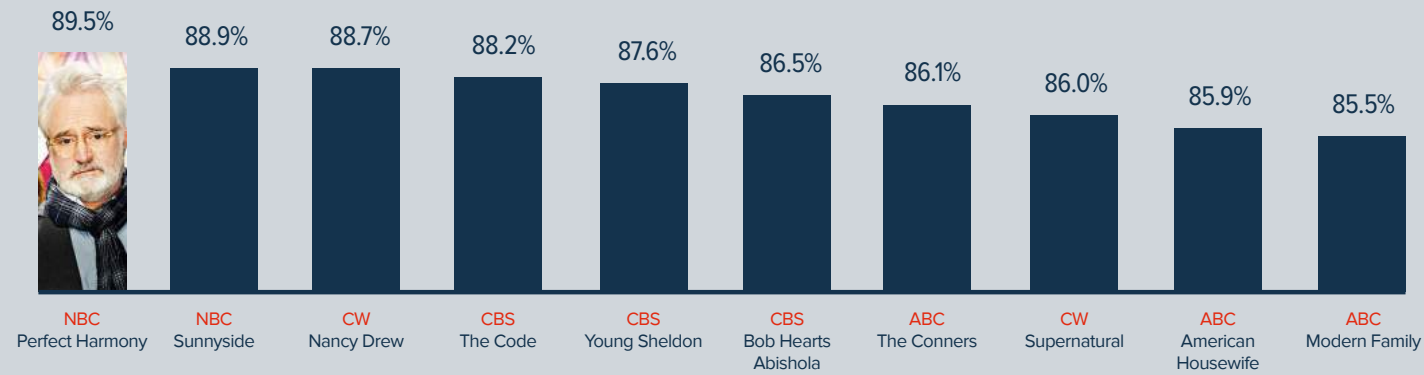
## CABLE

As usual, the highest performing cable shows generated better Viewability and Attention numbers than their broadcast peers, a testament to the intentional viewing habits required to seek out the less widely available and often niche programming that runs on cable.

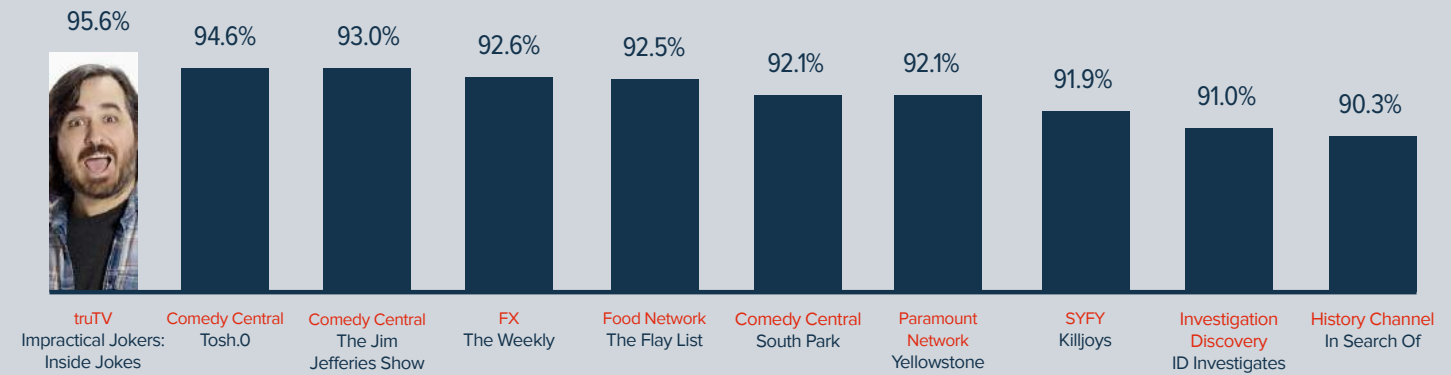
Shows that placed in the top 10 for both Viewability and Attention ranged from comedies (truTV's *Practical Jokers: Inside Jokes*, Comedy Central's *Tosh.0*), to news (FX's *The Weekly* docuseries), to drama (SYFY's *Killjoys*, Paramount Network's *Yellowstone*).

 Ad Viewability  Ad Attention

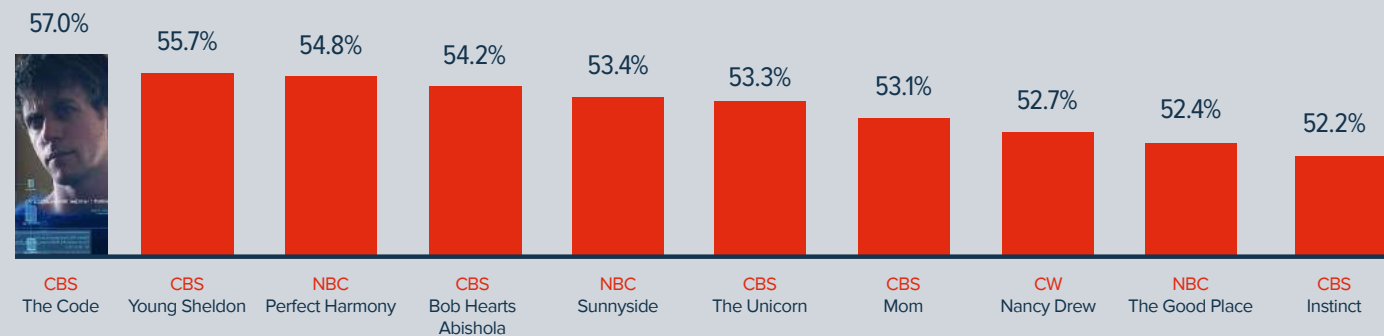
### Broadcast - Ad Viewability



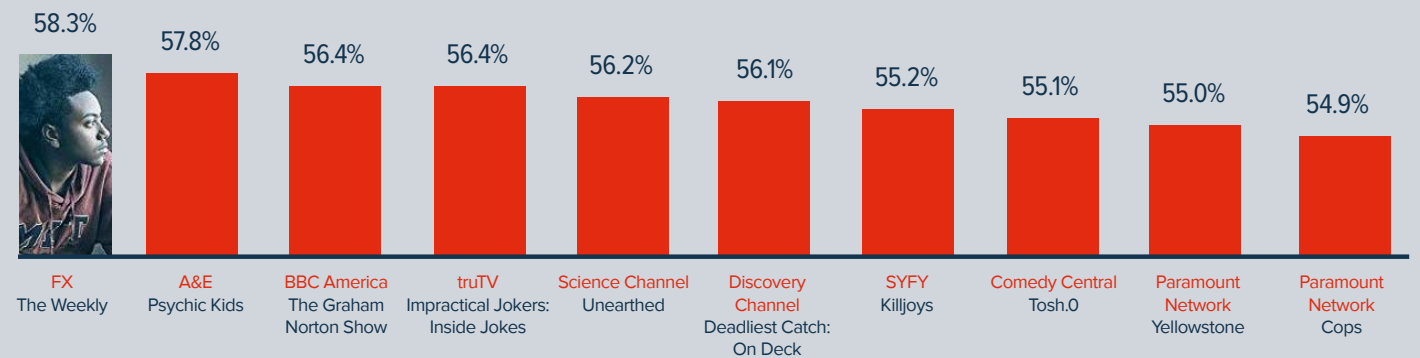
### Cable - Ad Viewability



### Broadcast - Ad Attention



### Cable - Ad Attention

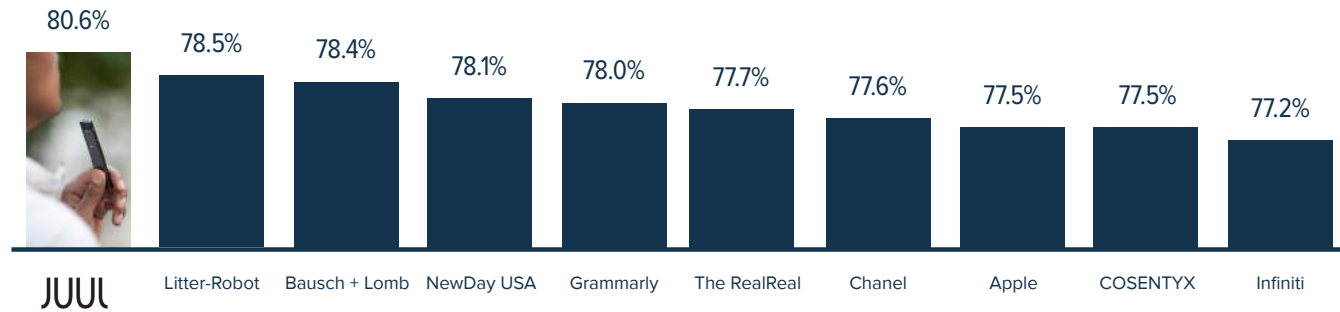


# For Brand Advertisers, it is Important to Optimize for Both Viewability & Attention

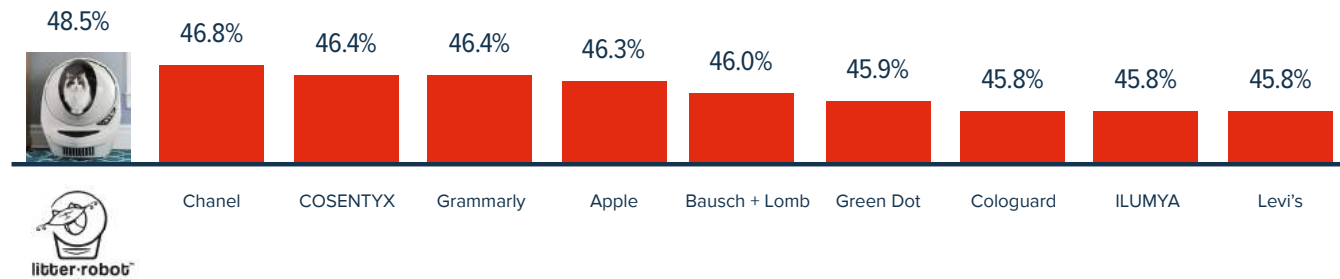
Brands in a wide range of industry categories performed well in H2 2019, with Litter-Robot (48.5%), Chanel (46.8%), COSENTYX (46.4%), and Grammarly (46.4%) generating the most Attention for their ads. All four brands also placed in the top 10 for Viewability, as did Apple and Bausch + Lomb.

 Ad Viewability  Ad Attention

## Top Brands, Overall Viewability

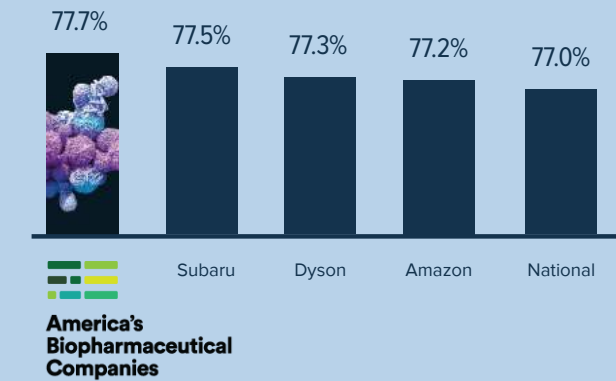


## Top Brands, Overall Attention

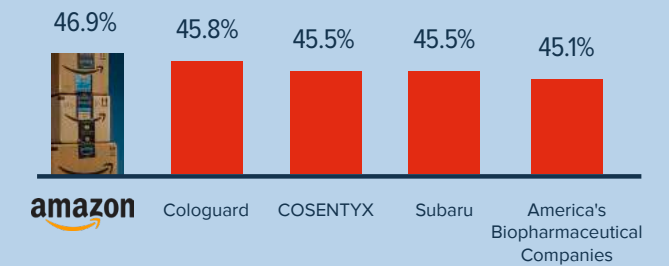


Amazon, Cologuard, and COSENTYX led the way in capturing male Attention, with Chanel, COSENTYX, and ILUMYA leading with women viewers.

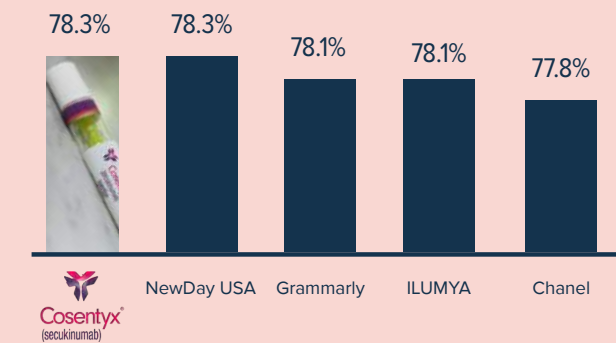
## Top Brands, Male Viewability



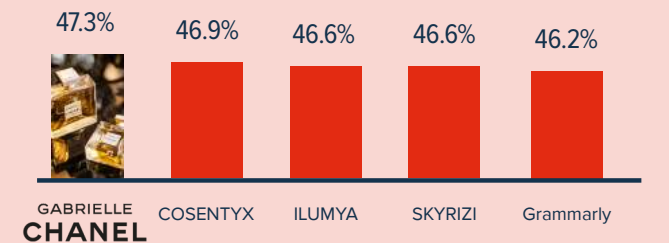
## Top Brands, Male Attention



## Top Brands, Female Viewability



## Top Brands, Female Attention



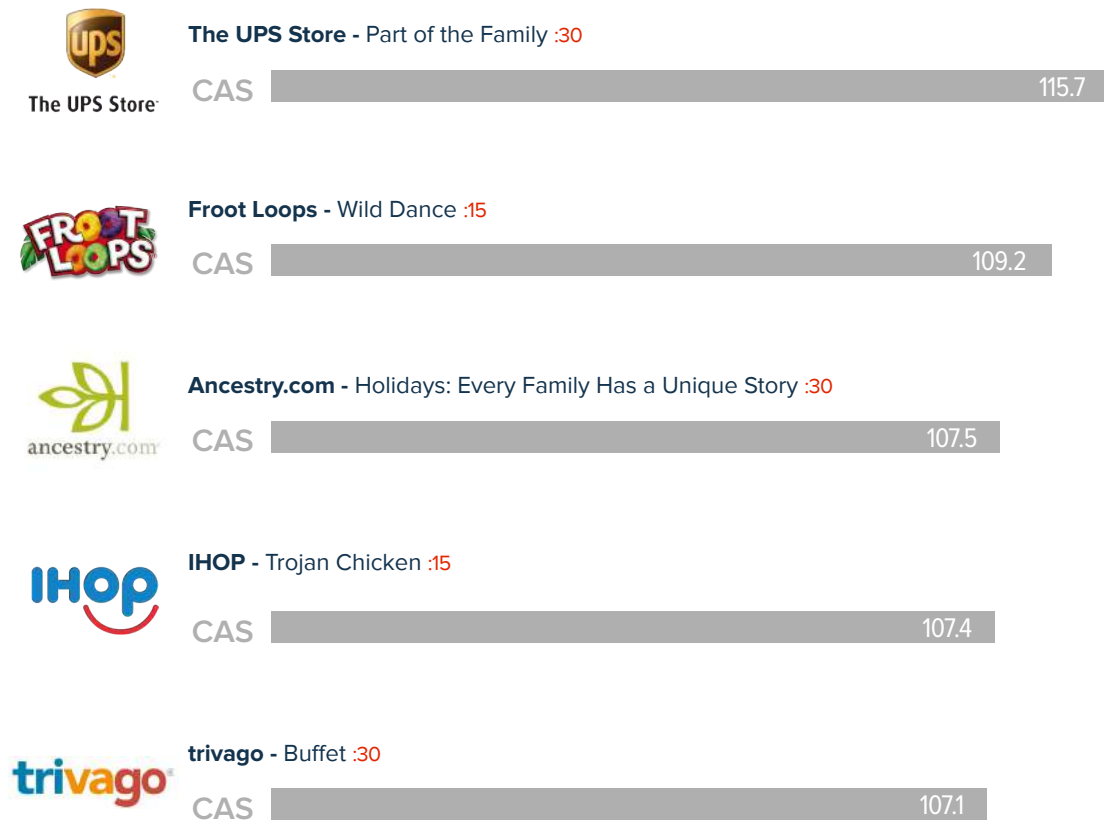
## Top Ads Breaking Through the Clutter

Creative Attention Score (CAS) measures a TV commercial's ability to grab viewer Attention, as compared to the other content that runs during the same ad pod. This allows us to better understand the quality of the creative itself, isolated from contextual factors like when the ad airs and which show it runs inside.

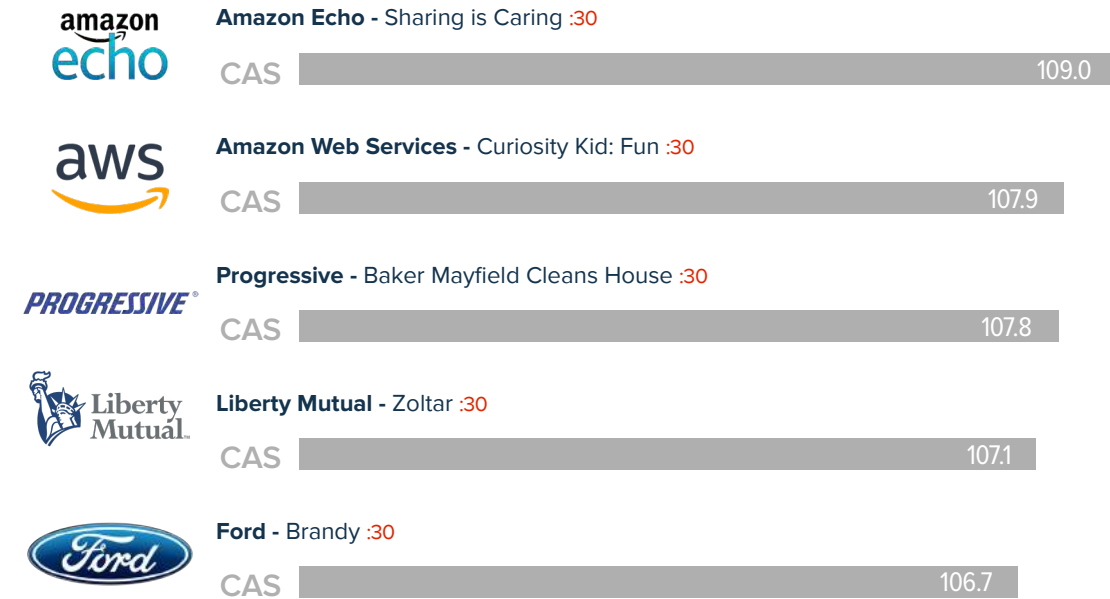
The most effective ad of H2 2019 was The UPS Store's comedic "Part of the Family" ad, which we broke down in detail earlier in this report. It was followed by a colorful, high-energy Froot Loops ad and a moving, family-focused ad from Ancestry.com.

Amazon Echo stood out during this time period, placing one ad each in the top five for male and female viewers.

### Top Overall CAS



### Top Men CAS



### Top Women CAS

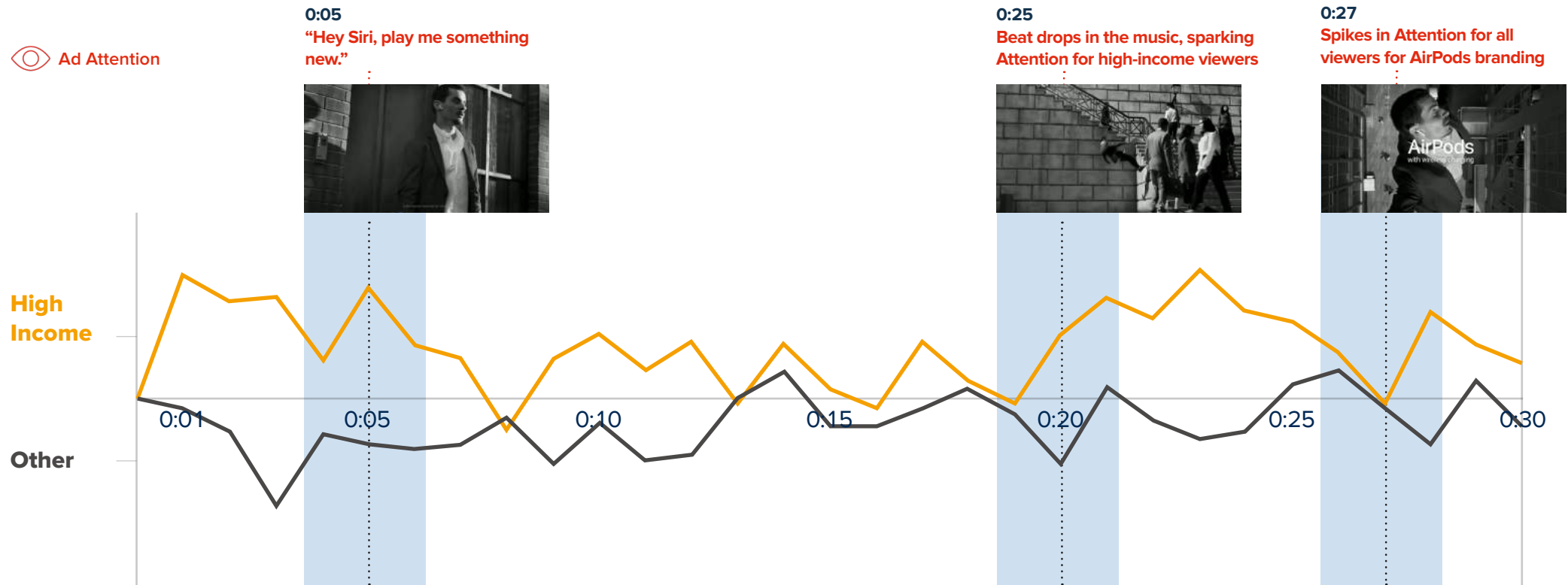


# How Apple AirPods Delivered Engaging Creative to High-Income Consumers

A recent Apple AirPods commercial showed an interesting contrast in how different people paid Attention to the ad. Overall, high-income viewers were more likely than others to engage deeply with the commercial.

Our second-by-second analysis shows that Attention spiked among high-income viewers when the ad's protagonists asked Siri to "play me something new," even as Attention held relatively flat for everyone else. A similar incident occurred at the 20-second mark, when high-income viewers started to pay closer Attention as the beat dropped in the song accompanying the ad. Conversely, non-wealthy viewers actively tuned out at this moment.

The final spike in Attention came at the 27-second mark, with viewers of all income levels heightening their engagement as the AirPods branding came on-screen.

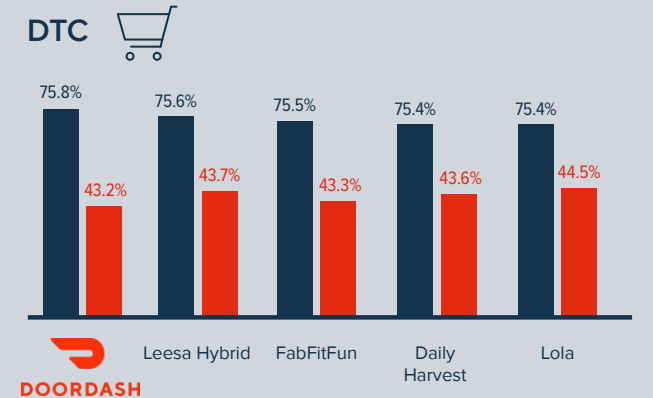
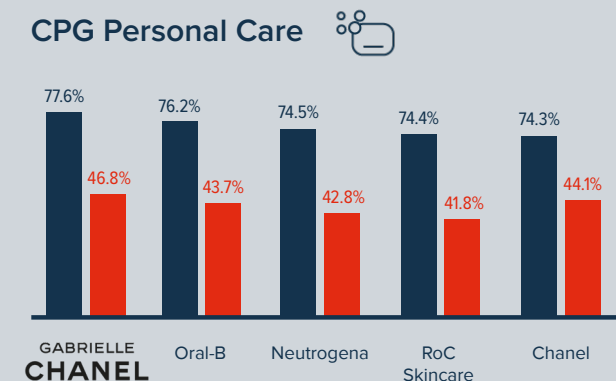
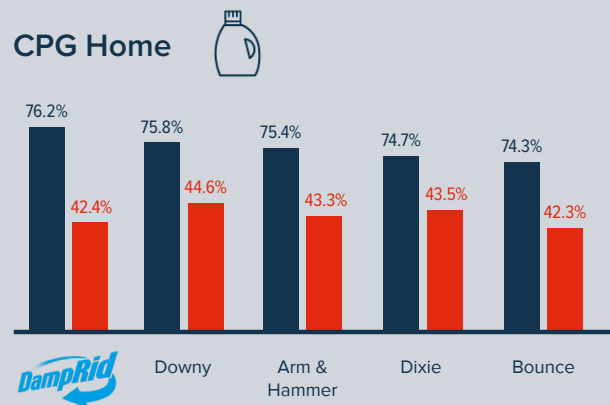
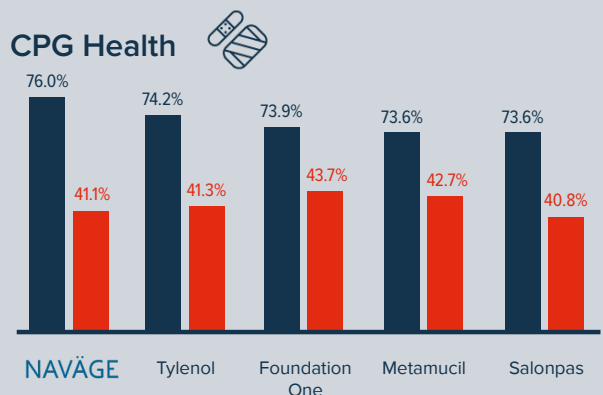
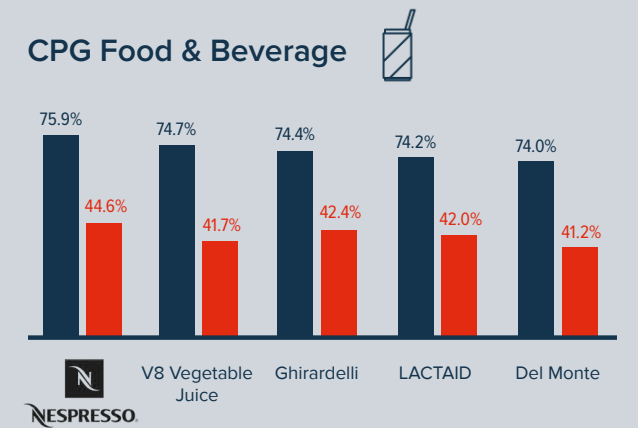
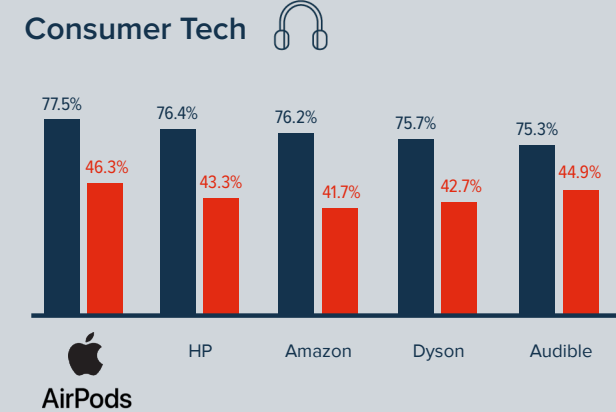
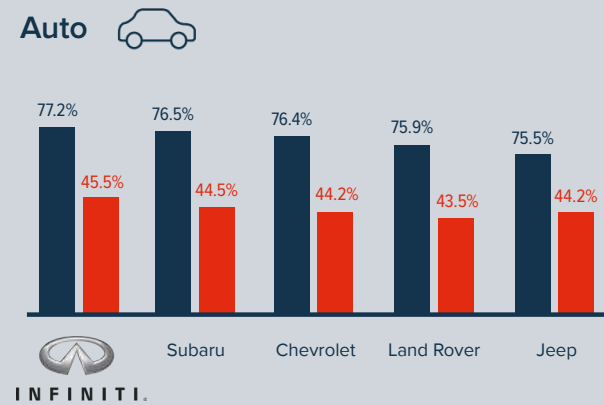
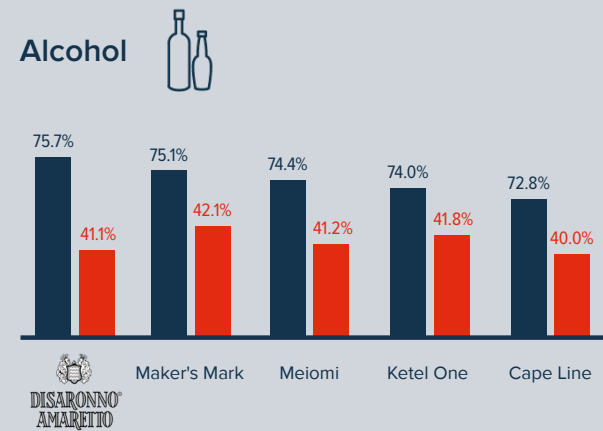


# From Auto to CPG Home – Here's Who Topped Their Competition

As shown on page 3, there is a wide variance in brand TV performance — driven by many factors, including industry. Across all major industries, understanding who makes the top brands — and doesn't — is key to understanding TV performance.

On the next few pages, we've ranked the top five brand advertisers for a variety of verticals by TV Viewability — the percentage of impressions where viewers were in the room during their ads. For these top Viewability brands, we've also shown their respective Ad Attention scores. While Viewability and Attention are important together, it's equally important to understand Viewability first — as an ad cannot capture Attention if a viewer is not in the room.

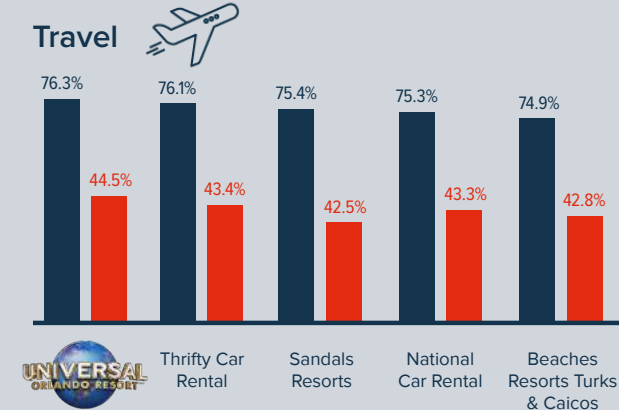
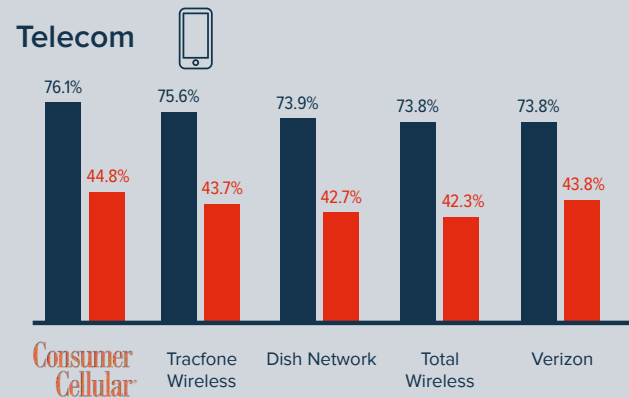
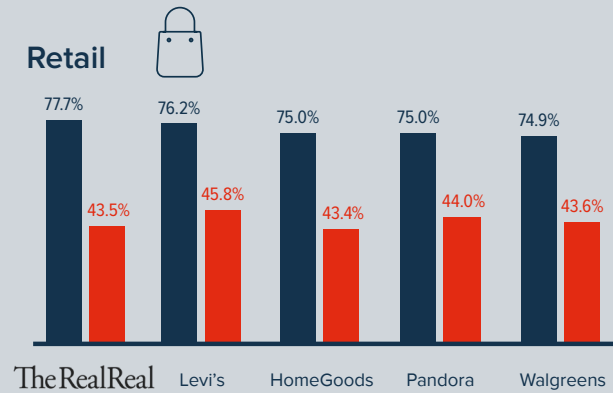
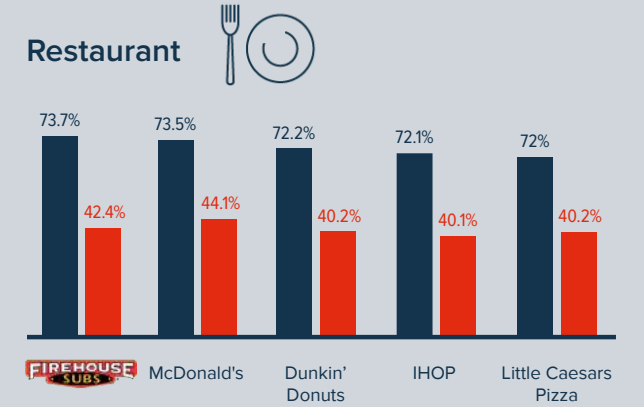
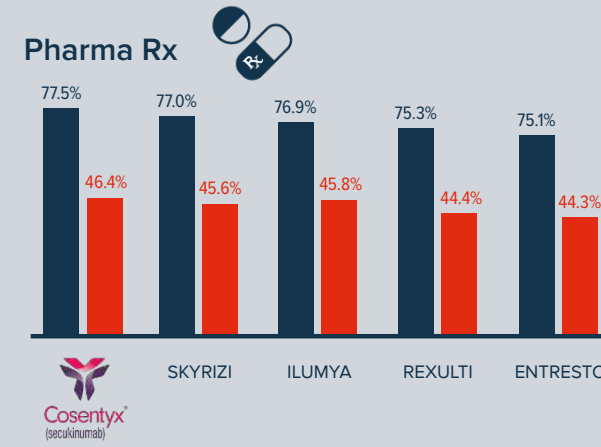
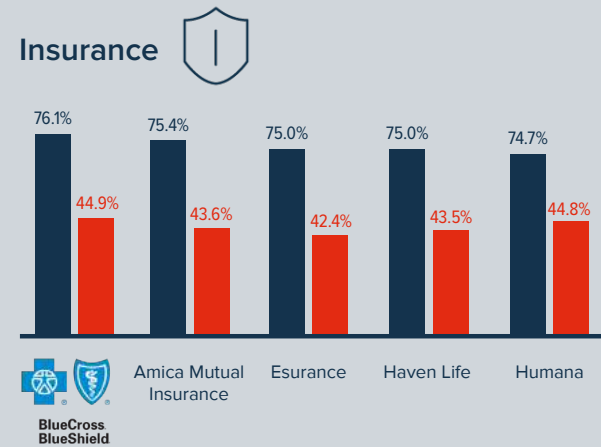
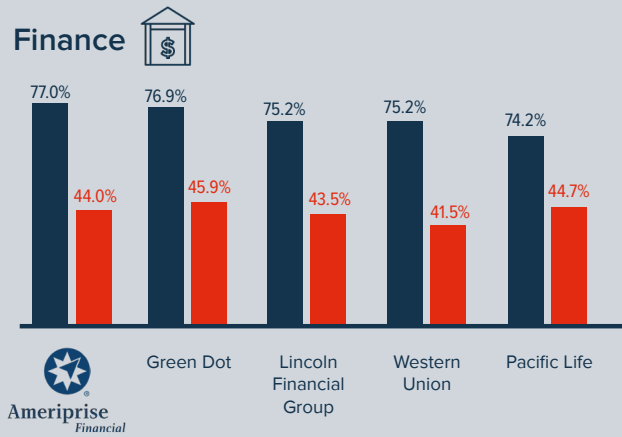
 Ad Viewability  Ad Attention



# From Finance to Restaurants – Here's Who Topped Their Competition

As shown on page 3, there is a wide variance in brand TV performance — driven by many factors, including industry. Across all major industries, understanding who makes the top brands — and doesn't — is key to understanding TV performance.

Ad Viewability Ad Attention





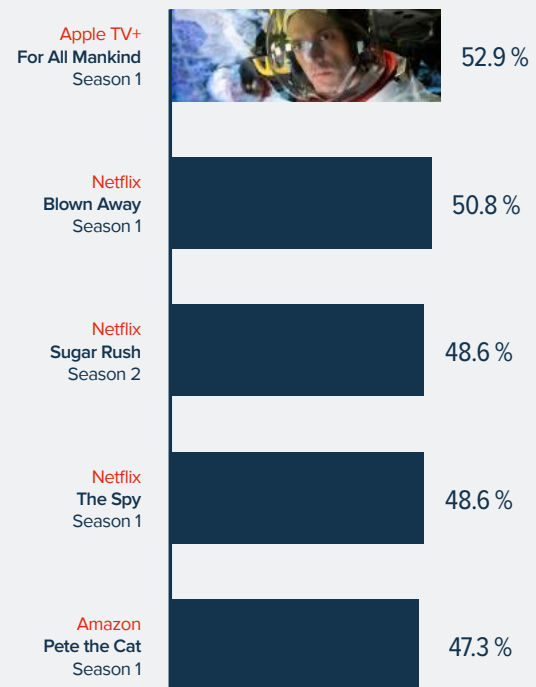
# H2 2019 Gave Us New Insights into How Viewers are Watching Streaming Content

TVision's computer-vision technology now offers measurement across all major OTT platforms. With this information, we're able to give brands and content producers deeper insight into which shows consumers are watching, how much Attention they're paying, and which platforms they're consuming content on.

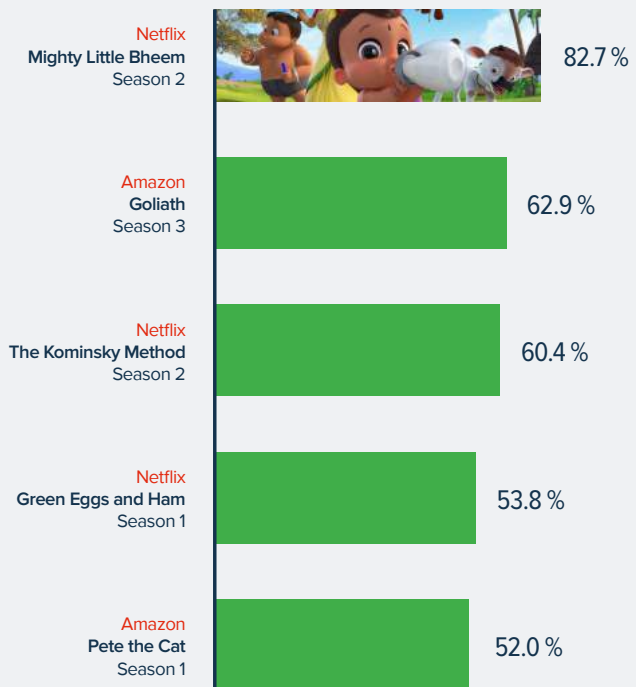
Our analysis helped us discover that the Netflix animated series *Mighty Little Bheem* is the most bingeable show on over-the-top television, with 82.7% of content consumption coming from viewers who watch three or more episodes in a single sitting.

Co-Viewing rates and Attention Index—which compares the Attention viewers pay during a given show against the average for all TV, including linear—are two other metrics that can help brands and content producers identify more valuable programming. Apple TV+'s *For All Mankind* was the only program to appear in the top 10 of both categories.

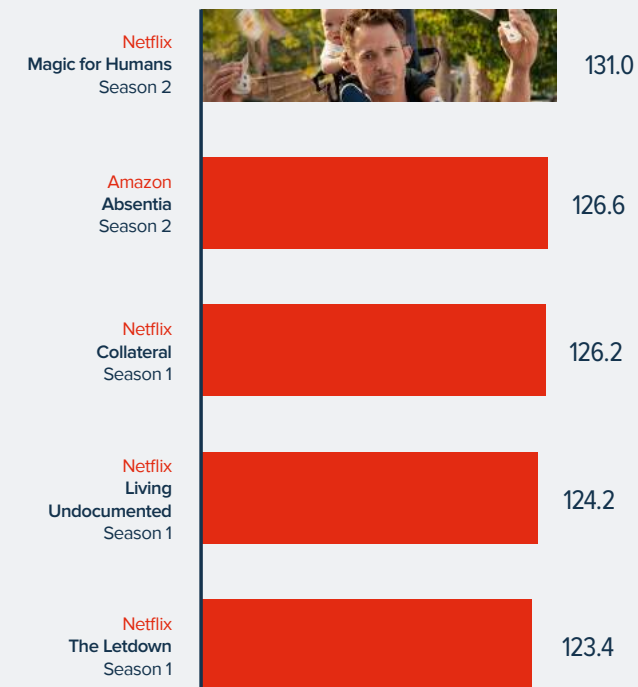
## Co-Viewing Rate



## Binge Rate



## Attention Index



**Co-Viewing Rate:** The proportion of episode views that occur with another viewer present.

**Binge Rate:** The proportion of episode views that occur in a binge-watching session (3 or more episodes of the same show).

**Attention Index:** How Attentive viewers are while in the room. 100 is the benchmark.



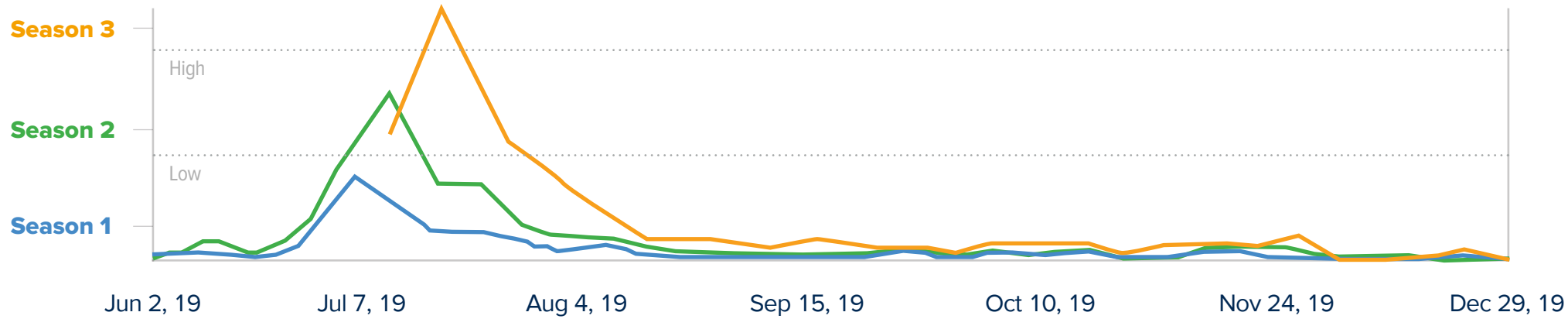
# OTT Spotlight: Stranger Things, Season 3

Netflix released the highly anticipated third season of *Stranger Things* this past Fourth of July, and viewers made sure they were ready in the days leading up to it. Viewership of Seasons 1 and 2 spiked in the week prior to Season 3's release, and over 40% of viewers watching the show with other people in the room throughout H2 2019.

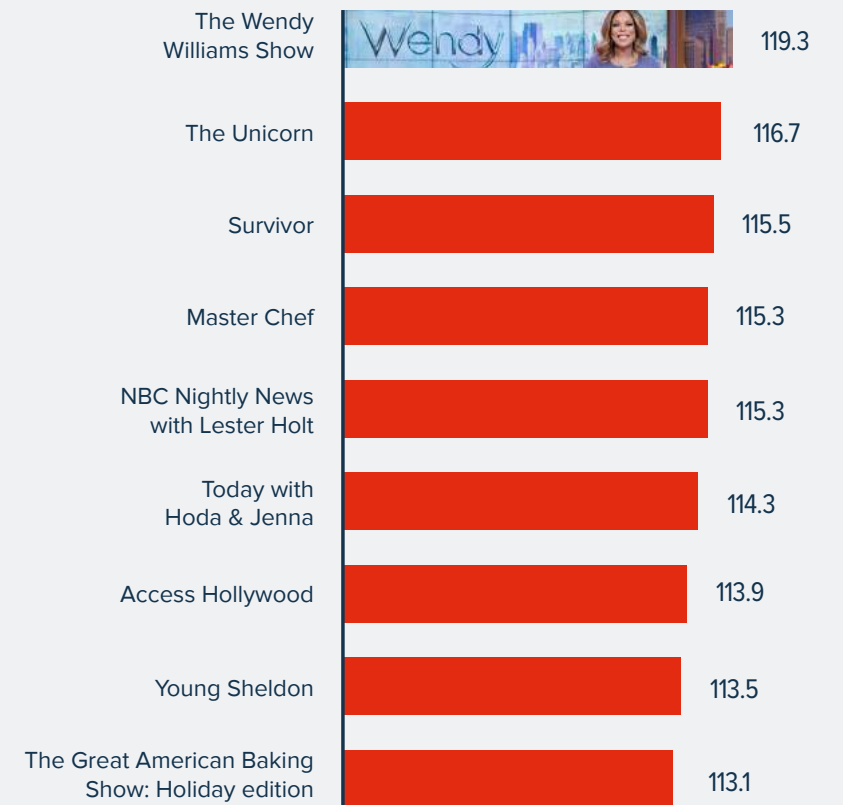
Our analysis also revealed other insights into how *Stranger Things* fans consumed the show. Binge Rate was relatively low for the show, a testament to the stamina required to watch three hour-long episodes consecutively. The show's viewers were about evenly split between men and women, but its 80s nostalgia themes helped build an audience where 57% of viewers were over the age of 35.

Advertisers hoping to reach the fans of the ad-free show can look to TVision's data to find these viewers elsewhere. By connecting our linear TV data to our OTT data, we were able to discover that *Stranger Things* fans are most attentive when watching programs like *The Wendy Williams Show*, *The Unicorn*, and *Survivor*.

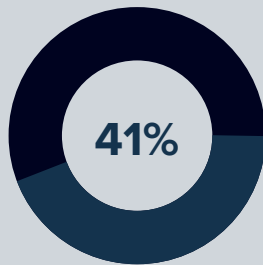
## Viewing Volume



## Here's What They Pay Attention to on Linear

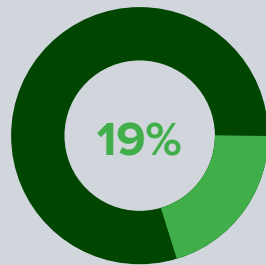


### Co-Viewing



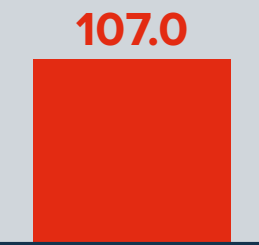
**Co-Viewing Rate:** The proportion of episode views that occur with another viewer present.

### Binge Rate



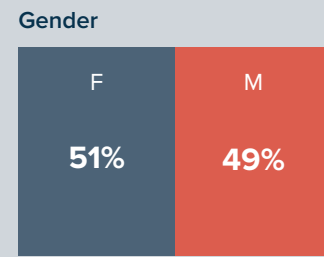
**Binge Rate:** The proportion of episode views that occur in a binge-watching session (3 or more episodes of the same show).

### Attention Index

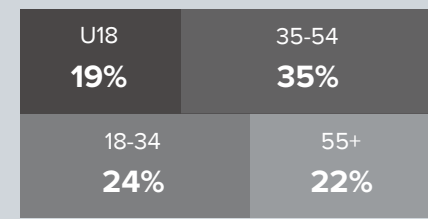


**Attention Index:** How Attentive viewers are while in the room. 100 is the benchmark.

### Share of viewing by...



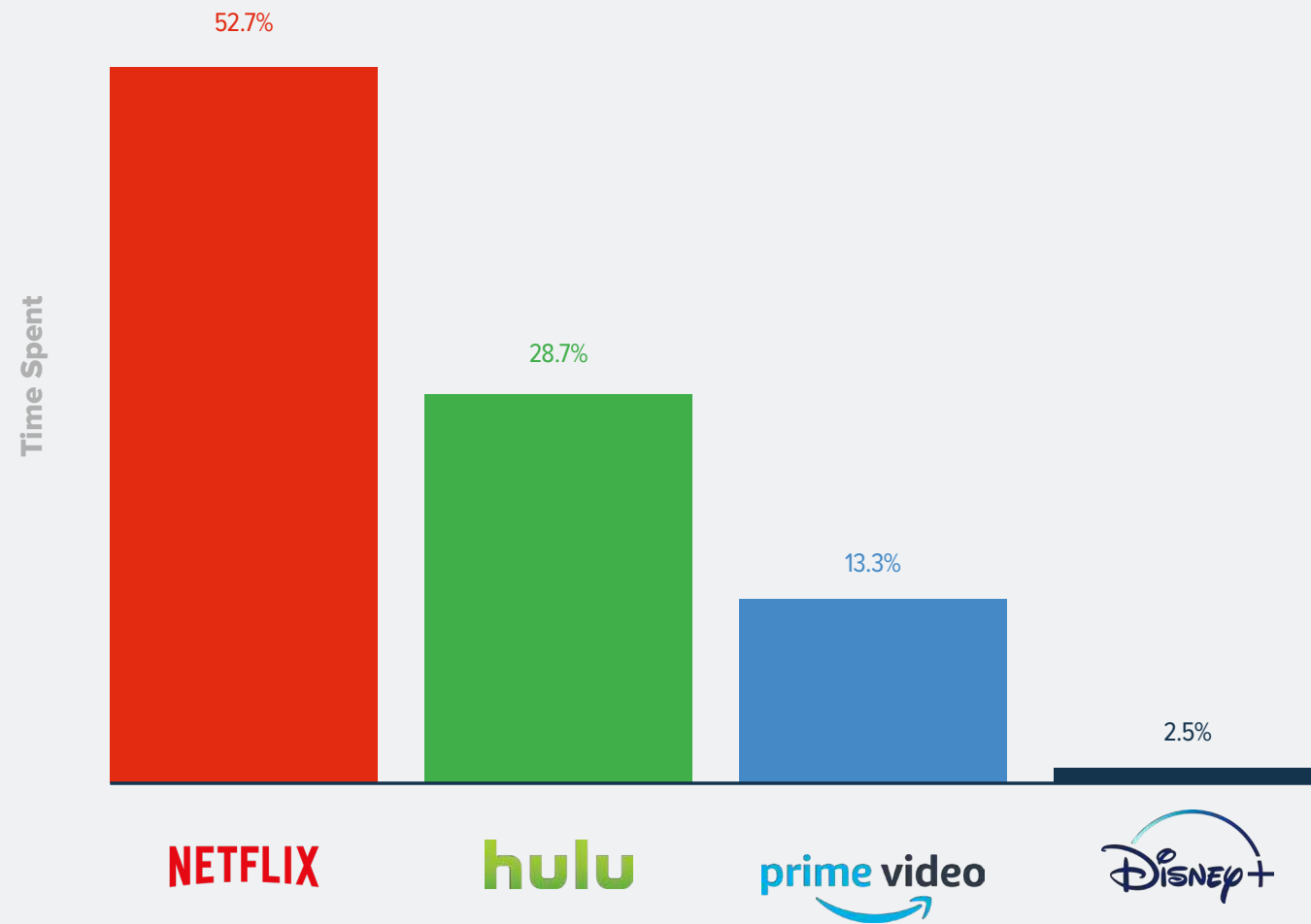
### Age



## Dissecting the App Landscape

As might be expected, Netflix dominated the OTT app landscape, claiming over half of all time spent. Hulu came in second with 28.7% of viewing time, followed by Amazon Prime Video (13.3%) and the new Disney+ (2.5%).

These apps are used across multiple OTT devices, including Amazon Fire, Roku, Google Chromecast, and more. Each device has varying share, devices per household, and household reach. For both buyers and sellers, it is important to measure the differences in how viewers access content.



\* Disney+ launched on November 12, 2019.

## Holistic Campaign Measurement Across Linear & OTT

As the leader in television measurement, we're always developing new tools to help TV advertisers spend their budgets more effectively. Here's a taste of what we've got in store for 2020...

### MEASURE PERFORMANCE NO MATTER WHERE YOUR ADS AIR

As OTT consumption continues to explode, brands need to be able to measure their campaigns across linear television and a growing set of digital platforms. With TVision's forthcoming holistic campaign measurement solution, advertisers will be able to do just that.



### ASSESS PERFORMANCE WITH 360-DEGREE CAMPAIGN MEASUREMENT

- Combined Linear + OTT Viewability, co-viewing, and Attention data
- Filter by target demographic across platforms
- Track performance over time
- Break out linear vs. OTT Attention, reach, and Viewability
- Measure performance by OTT application and linear TV channel
- Identify unique OTT reach
- Compare with competing channels and applications

### Holistic TV Ad Measurement

#### LINEAR ADS



#### STREAMING / OTT ADS



- Campaign Viewability & Attention
- Campaign co-viewing
- Application & program verification data




# About TVision


## The Leader in TV Performance Metrics

TVision measures what was once unmeasurable — how people really watch TV. Using cutting-edge computer vision technology, only TVision measures person-level, second-by-second TV engagement. Marketers and media sellers access TVision's TV performance metrics via its software-as-a-service platform. TVision's customers include some of the world's largest brand advertisers and TV networks. TVision is headquartered in New York City, with offices in Boston and Japan.

## Solutions to Make Your TV Work Harder

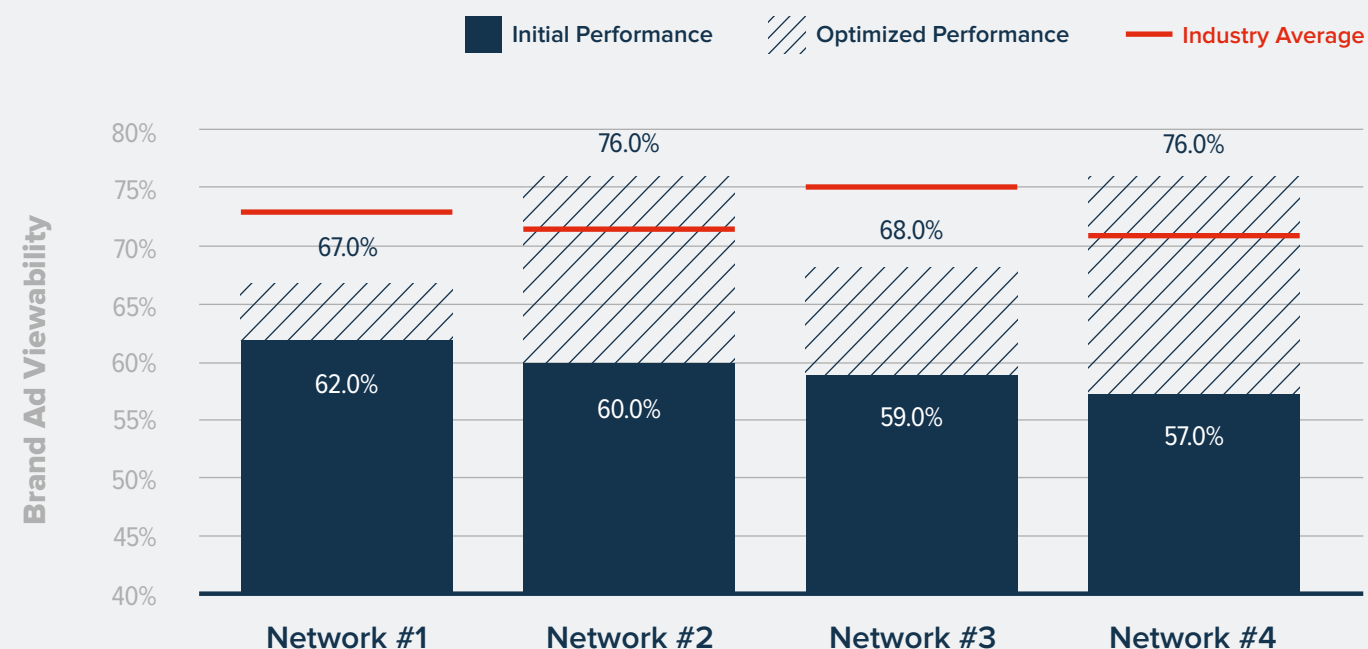


**PLANNING**  
Use performance metrics like Viewability and Attention to plan media — across your Upfront, scatter, or quarterly buybacks.



**OPTIMIZATION**  
Our always-on solution is updated daily. Understand what's going on in your campaign and adjust channel allocations within Network groups.

## How One Brand Applied TVision Data to Improve Campaign Performance



# Methodology & Metrics

## Methodology

TVision measures Ad Viewability and Ad Attention for every second of programming and advertising on television. Every time a person walks into the room, our technology detects who the viewer is, where they are in the room, and what their eyes are looking at. We do all this without personally identifying individual users, and without transmitting any images or videos.

The data for this report was collected from July 1 to December 31, 2019, from 5,000 homes across the United States. All data is weighted to represent the country. All demographic data was self-reported by the respondents.

## Additional Notes

- All data is measured second-by-second, person-by-person.
- All data includes Live Plus 3 Days.
- All data is for viewers P2+.
- Top brands and ads do not include network promotional ads or local ads, and are limited to :15 and :30-second ads.
- To qualify for rankings, top brands must have captured a minimum sample of 2,000.
- To qualify for rankings, all programs must have a minimum sample size of 500.
- Top programs and ads are limited to English-speaking content only.
- To qualify for rankings, all ads must have a minimum sample size of 1,000.

## Key Metrics / Definitions



### Ad Viewability (%)

This metric measures how effectively viewers are kept in the room while ads are on-screen. It is measured as the percentage of all ad impressions in which a viewer was in the room for two or more seconds.



### Ad Attention (%)

This metric measures how effectively an ad or ads held viewers' attention while they aired. It is measured as the percentage of all ad impressions in which the viewer was looking at the TV screen for two or more seconds.



### Creative Attention Score (CAS)

This metric measures an ad's ability to grab the audience's attention, as compared to surrounding content. CAS measures the percentage of an ad's aggregate run time that viewers spent with their eyes on the screen, as indexed against the other ads that ran in the same ad pod.

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